Platform Learning Guide

A quick guide to the PROSE Platform (PROSE H3.1)

Table of Contents

1.Introduction....2
2. Start your Project....2
2.1 Setting up an account....2
2.2 User Management....2
2.3 Code management....5
3. Collaboration and communication....7
3.1 Issue management – Tickets....7
3.2 Communication Tools....7
4. Statistics and Metrics....9
More Information....9

This document is a summarized version of PROSE Deliverable D3.1. More information can be found on PROSE website http://ict-.prose.eu or the PROSE platform at opensourceproject.eu.

1. Introduction

PROSE approaches FLOSS projects with centralization of FLOSS projects on a single platform that serves both the networking of communities as well as support tool for developers. The aim of the platform is to increase the quality and sustainability of the projects it hosts.

The platform is designed to fall in line with the needs of European ICT projects and was built on an extensive survey conducted to map the features that most projects need in their development. Additional support is available through PROSE material on legal aspects and business models. These handbooks, much similar to this one, will support the projects on the online platform on Open Source issues of EU projects.

To complement the technical information regarding features and use, you can use the Platform Handbook and the quick start guide, which you can easily approach with the following URL: http://docs.opensourceprojects.eu/.

2. Start your Project

This short handbook gives a quick look into how to get started with the PROSE platform, in order to become acquainted with the most important aspects of the platform. For more detailed information please read the user handbook or have a look on the features of the platform you can find from the platform user manual, available from http://www.ict-prose.eu/resources or from the platform itself at http://opensourceprojects.eu.

2.1 Setting up an account

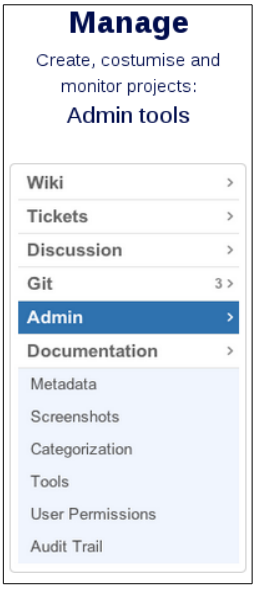
Using the platform requires a user account. You can create one directly from the front page. Fill in your preferred display name, user name and email address. You will soon receive an email with an activation link and your password. Activate your account by clicking the link and following the instructions given. You can now start working on the platform.

To login with your existing account, click the top right corner login-link and insert your username and password.

2.2 User Management

User Management is the section of platform meant exclusive for users to manage their account settings and personal information. It provides the standard tools to allow users to change their account and profile settings and their personal data.

Choosing *PROFILE* from the top bar menu you get to see your newly created public profile. It shows your projects, personal data; skills, and email address you logged in with. You can change these details selecting *Admin* option from the left side menu, as shown on the left. Initially you will have limited selection of options, but the options increase when you start up a project.



The user profile handles all user related information and explains how it is handled. User information can be configured like any other project in the platform. The default tools available to you are: Profile, Wiki and Admin. These tools allow you to manage your information and the visibility of that information.

2.2.1 User Settings

You can change your profile's settings from the *SETTINGS* – option on top menu. On the *User Settings* page you, the user, are able to set or change several personal details. A part on this page is reserved for user contact details, like email, Skype, and social media contacts. You can also give the URL to your personal website, if you have one.

On the more critical identification data, you are only allowed to change the display name and password and set or change the primary email address associated to the account.

The user settings page also gives you a single-page to manage your subscriptions. These are the items for which the platform will send you an email notification when an update happens. You are automatically subscribed only to your own wiki by default, but can follow other applications as well.

2.2.2 Admin

The Admin menu option gives you the options to a set of sub-features, such as user's metadata, tools, third-party users' permissions and audit trail, and is managed in a similar way to any available project.

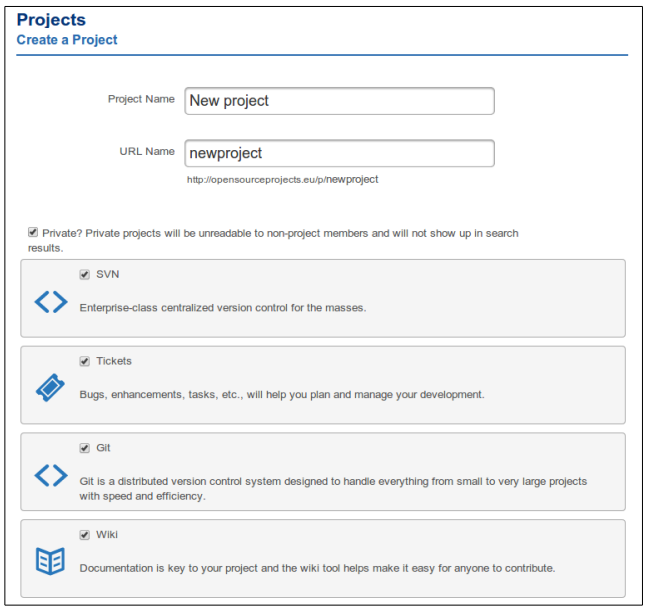
2.2.3 Creating a Project

The most important part of the management tools is the actual project creation process. It can be accessed from the top menu under PROJECTS. This opens a list of projects available to you. To create one of your own, select the + Add a Project from the left side menu. This opens a project creation interface.

Type in the new Project Name and "URL Name" (3-15 characters long, using only letters numbers, and dashes). This name will determine the project's base URL.

Then select the services that will be initially enabled. You can add or delete services at any time. You can also select your project to be private by ticking the *Private option* box.

When you create a new project, you automatically are given administrator rights for that particular project. After creating a new project, you will be brought to the project's "Metadata" page, which may be accessed at any time. Here you can add in all the metadata relevant to your project.


Projects
Create a Project
Project Name
New project
URL Name
newproject
http://opensourceprojects.eu/p/newproject
Private? Private projects will be unreadable to non-project members and will not show up in search results.
SVN
Enterprise-class centralized version control for the masses.
Tickets
Bugs, enhancements, tasks, etc., will help you plan and manage your development.
Git
Git is a distributed version control system designed to handle everything from small to very large projects with speed and efficiency.
Wiki
Documentation is key to your project and the wiki tool helps make it easy for anyone to contribute.

More options in this category include:

- **Screenshots** allows adding screenshots and captions of the project.
- **Categorization** influences how the platform indexes the project.
- **Tools** provide a very flexible approach allowing projects to turn on or off the features that are more relevant to each effort.
- **User Permissions** determine the capabilities of each user on the platform.
- **Audit Trail** displays a list of project activity.

2.2.4. Creating a sub-project

Sub projects are a common part of large projects that require maintaining several tools and source code under a common group, such as an ICT project. You can create sub-projects under the *Tools* – selection.

You will be given two choices to create a sub-project: associate a sibling project or create a new project as sub-project of the main one.

To achieve either of available options, it is necessary to navigate to the main project's tools page

Login > Projects > ProjectName > Admin > Tools

and click to add a new ***Subproject tool***. A form will pop up for you to fill in the sub-project's information, such as its Label and its Mount Point. The platform checks if the mount point already exists and either associates the existing point as the main one, or creates a new project with the specified title in Label and URL name. This information is saved with the save button.

After the pop-up window is dismissed, the new Subproject tool will be listed along with the other installed tools.

2.2.5. Adding users to the project

User permissions are an important part of the platform. They determine the capabilities of each user on the platform and allow defining the visibility and scope of individual projects. It also allows creating private projects to either specific users or groups of users.

It is possible to manage individual permissions regarding projects, either by managing single users or by adding groups of users, from the User Permissions administration screen.

Projects > ***ProjectName*** > Admin > User Permissions

To add a user to a group, select "+ Add" under the appropriate group and enter their *username*. Note that this is the unique *username*, not a display name.

To remove a user, select the "-" (minus) next to their *username* and confirm removal.

The default groups that users can be grouped into are:

- **Admin**: Project administrators have full control over the projects, and can add/remove other members
- **Developer**: Most tools will allow Developers to perform most non-admin functions by default.
- **Members**: Generally they have fewer permissions by default.
- ***Authenticated**: Any user signed into *OpenSourceProjects.eu*.
- ***Anonymous**: Everyone, regardless of whether they are logged in or out.

A user with *Admin* rights belongs to all groups with lesser rights. This is also true with *Developer* and *Member* groups.

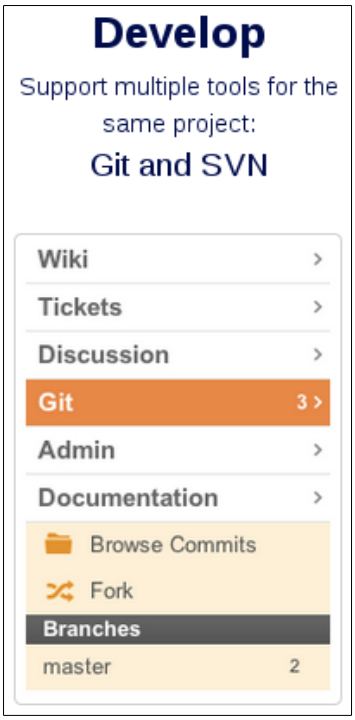
You can also add your own custom groups with customized rights. Also the rights within each individual tool can be customized group specifically. For more information on individual rights, consult the Platform Handbook.

2.3 Code management

An important part of any forge platform is the source code management. As of now, there are two supported technologies for source code management on the platform: **Git** and **SVN.**

They are supported by adding the corresponding tool, and can support multiple tools for the same project. Therefore it is possible to have more than one GIT repository for a project, or even concurrent GIT and SVN repositories.

Before we start, it should be noted that internally the platform does not maintain any synchronization between repositories of the same project and they are handled completely independent of each other, therefore adding a GIT and an SVN repository will corresponding to two entirely different source code trees.



2.3.1. GIT

GIT is enabled as a project tool, as already mentioned. Once added, a new Code entry will appear on the project under :Projects > ***ProjectName*** > Code

After creating a new project, you can choose the needed tools for that project. For Source Code Management (SCM), when both Git and SVN are chosen, GIT is defined as the default when selecting the Code entry.

Git is a SCM, a tool for software developers which supports collaborative development of software within a team, and the tracking of changes to software source code over time.

Git is used by developers, and advanced users who need the very latest changes to the software (before releases occur). Software users generally do not need Git; typically they will download official file releases made available by the project instead.

Developers should familiarize themselves with Git by reading the Git Documentation or traversing through a Git tutorial.

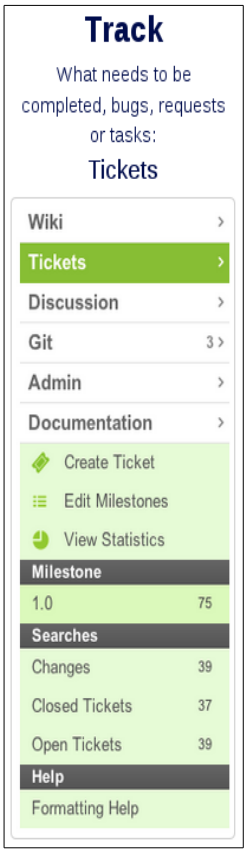
2.3.2. SVN

Depending on the current tool configuration when adding an SVN repository it may be available on the Code tab or at the selected name for the tool. Apache Subversion is a software version and revision control system distributed under an open source license. It allows users to maintain current and historical versions their project files.

To use an existing project it is only necessary to checkout the source code. A command line example to import an already existing source code is:

```
svn checkout --username=user
http://opensourceprojects.eu/svn/p/project/code/trunk project-code
```

3. Collaboration and communication



Collaboration in the platform revolves around a set of traditional collaboration tools, an issue tracker for technical reporting, wikis, forums and blogs.

3.1 Issue management – Tickets

Issue management is available on the platform as one of the more important tools. It directly supports the development process and tickets allow the users and developers to interact with the project maintainers and main developers. In this section you get a rough overview of how tickets are configured in a specific project and how end-users can take advantage of them.

Tickets are specific items that correspond to problems identified in the software, missing features requested by end users, or general communication items between developers and users. In many tools they are also known as “issues” or “bugs”, and hence the name of issue or bug trackers.

The ticket tracker tool is designed to allow for flexibility in how you track items of work that need to be completed. This includes bugs, feature requests from end users, or any other task you want to keep track of. You can even install multiple ticket trackers for different purposes. For example, a large project could have individual trackers for the design team, the documentation team, the developers, and another for support. Each of these trackers can have their own unique list of tickets, as well as custom fields, custom milestones, and their own "mailing list." Tickets can even be moved between tickets instances, even if they're on different projects.

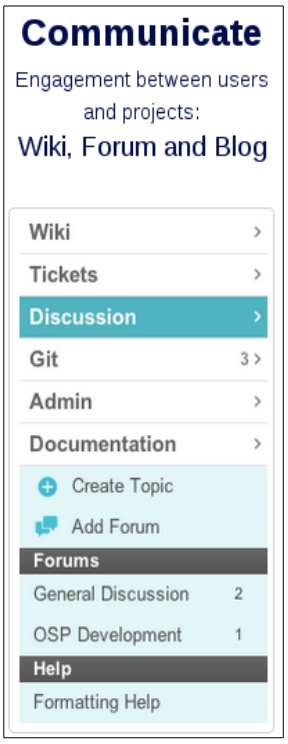
3.2 Communication Tools

Communication is key for the engagement between users and projects. The platform allows users to interact through several methods of communication. Here we introduce three:

- The Wiki
- The Forum
- The Blog

Following the instructions here you can quickly setup your communication tools. To get the full benefit of the tools, learn more from the platform electronic guides: opensourceprojects.eu website.

3.2.1 Wiki



The wiki is a collaborative document editor which is easily edited and can be used for various documentation needs, both internal and external. By default any project developer can edit the project wiki, but permissions can be regulated as you wish them to be available to different user groups. Like most modern wikis, all edits are non-destructive and a copy of every version is stored.

3.2.2. Forum

Discussion forums are a way to collaborate with other developers on the project, but they can also be used to discuss with end users. A project administrator can create as many different forums as needed by clicking on *Add Forum* on the left sidebar of the discussion page. To do so you must have activated the discussion module under tools. It is up to the administrator to create and name as many forums as required by the project work flow. You can create as flexible environment as you wish.

Most of the fields are standard fields. Those worth to note are as follows:

- **Short Name** is the short name that forms the forum URL.
- **Parent Forum** selects a parent if the forum is to be a sub forum of another one.
- **Monitoring Email** defines the email address notifications should be sent to.

The **Developer Only** option can be used to set a forum to be viewable by developers only, even if most forums are publicly available.

You may install or remove a Discussion via *Admin* > *Tools*. Once installed, there are a number of configuration options available for each Discussion instance.

From the *Options* page you can edit the **Posting Policy** of the forum. It determines how moderated posts are handled.

3.2.3 Blog

The blog tool can be used for providing news about your projects. Examples include release notes and change logs, announcing events related to your project, and so on. Nowadays blogs are very important communication streams, as they provide a way of keeping up-to-date with project specific news and provide a direct communication channel to the target audience.

4. Statistics and Metrics

The platform already provides some support for statistics collection and display. Even though limited, there are a few available options to projects. The platform team will work on adding more pending customer requests and consultations.

The important issue to start with is to deal with in platform ticket statistics, and with external collection through Google analytics support. As the project grows in terms of in-platform statistics collection, more content will be added to the platform user manual.

More Information

You now have the very basics covered on what you need to run and manage a project and a dynamic community with PROSE platform. For more detailed information, consult the full User Guide titled *Platform Handbook*, available at www.ict-prose.eu/resources.

The platform itself contains documentation on its features. You can find these in the *Documentation* section of the platform at **http://docs.opensourceprojects.eu/**.

This short instruction give you a smart look into how to get started with the PROSE platform. You become acquainted with the most important aspects of the platform.

In particular this includes an introduction how to start your first project on the platform, which tools for documentation and collaboration are available, and in which way you can keep track on and measure your effort.

With this short introduction you hold the very basics covered on what you need in order to run and manage a project and a dynamic community with PROSE platform.

The PROSE Team wish you much success and fun working with the PROSE platform. We look forward to welcoming you in the future on our platform.

PROSE, and European Commission FP7 funded project, will promote the adoption of open source software on ICT projects through increasing the lifetime of the software developed inside European projects and thus maximizing impacts. This will be achieved through the creation of a coordination platform for hosting software projects, as well as promoting dissemination and training events on Open Source topics.

To achieve this vision PROSE will promote FLOSS for ICT projects by removing existing obstacles, especially legal and business barriers. PROSE will provide a platform for hosting and supporting (ICT) FLOSS software that allows creating and managing software repositories. To support the FLOSS adoption process, PROSE provides training documentation for the software platform, and also for the legal and business aspects that relate to FLOSS use.

All PROSE consortium parties have agreed to full publication of this document. The commercial use of any information contained in this document may require a license from the proprietor of that information. Neither the POSE consortium as a whole, nor a certain party of the PROSE consortium warrant that the information contained in this document is capable of use, or that use of the information is free from risk, and accept no liability for loss or damage suffered by any person using this information.

This document provides general guidance on licensing and IP issues and is not legal advice. Should you have specific questions or require advice for your Project appropriate legal advice should be taken in the relevant country. The Parties forming the PROSE Consortium accept no liability for any reliance placed on this document and to the fullest extent permitted at law disclaim all liability. This document is provided without warranty.

© PROSE Consortium 2013